[Your Name/Representative Name]
[Family Office Name]
[Address Line 1]
[Address Line 2]
[Date]

[Recipient Name/Relationship Manager]
[Bank or Institution Name]
[Department Name]
[Address Line 1]
[Address Line 2]

RE: Request to Open a Private Wealth Management Account for [Family Office Name]

Dear [Recipient Name],

I am writing on behalf of [Family Office Name] to formally request the opening of a Private Wealth Management account with [Bank or Institution Name].

As a [Single/Multi] Family Office managing the assets of the [Family Name] family, we are looking for a strategic partnership that offers sophisticated investment solutions, custodial services, and dedicated relationship management. Our primary objectives include capital preservation, global asset allocation, and multi-generational wealth transfer.

We have selected your institution due to your reputation in the private banking sector and your specialized services for family offices. We intend to initialy fund the account with [Amount and Currency] through [Source of Funds].

Attached to this letter, please find the following preliminary documents for your Know Your Customer (KYC) and due diligence processes:

- Certificate of Incorporation/Registration
- Family Office Charter or Partnership Agreement
- Proof of Source of Wealth
- Identification documents for Authorized Signatories and Beneficial Owners

Please let us know the next steps in your onboarding process and any additional documentation required to finalize this application. We are available for an introductory meeting at your earliest convenience.

Thank you for your time and assistance. We look forward to a long-term professional relationship.

Sincerely,

[Signature]

[Printed Name]
[Title/Position]
[Phone Number]
[Email Address]